

# Tenant Household Information Form

(for use in Year 3 - 100% Tax Credit Properties only)

(MM/DD/YYYY) - complete on a yearly basis on annual certification cycle

## PROJECT DATA

Property Name: \_\_\_\_\_ County: \_\_\_\_\_ BIN #: \_\_\_\_\_  
Address: \_\_\_\_\_ Unit Number: \_\_\_\_\_ # Bedrooms: \_\_\_\_\_

## HOUSEHOLD COMPOSITION

| HH Mbr # | Last Name | First Name & Middle Initial | Relationship to Head of Household | Date of Birth (MM/DD/YYYY) | F/T Student (Y or N) | Social Security or Alien Reg. No. |
|----------|-----------|-----------------------------|-----------------------------------|----------------------------|----------------------|-----------------------------------|
| 1        |           |                             | HEAD                              |                            |                      |                                   |
| 2        |           |                             |                                   |                            |                      |                                   |
| 3        |           |                             |                                   |                            |                      |                                   |
| 4        |           |                             |                                   |                            |                      |                                   |
| 5        |           |                             |                                   |                            |                      |                                   |
| 6        |           |                             |                                   |                            |                      |                                   |
| 7        |           |                             |                                   |                            |                      |                                   |

## RENT

Tenant Paid Rent \$ \_\_\_\_\_  
Utility Allowance \$ \_\_\_\_\_

Rent Assistance: \$ \_\_\_\_\_  
Other non-optional charges: \$ \_\_\_\_\_

GROSS RENT FOR UNIT:  
(Tenant paid rent plus Utility Allowance & other non-optional charges)

\$

Unit Meets Rent Restriction at:

☐ 60% ☐ 50% ☐ 40% ☐ 30% ☐ \_\_\_\_\_%

Maximum Rent Limit for this unit: \$

## STUDENT STATUS

ARE ALL OCCUPANTS FULL TIME STUDENTS?

☐ yes ☐ no

If yes, Enter student explanation\*  
(also attach documentation)

Enter  
1-5

\*Student Explanation:

- 1 TANF assistance
- 2 Job Training Program
- 3 Single parent/dependent child
- 4 Married/joint return
- 5 Former Foster Care

\*If the above answer is yes, a Student Verification Form (completed via 3<sup>rd</sup> party) must be attached to this form

## SIGNATURE OF TENANT and OWNER/REPRESENTATIVE

Based on the representations herein and upon the proofs and documentation previously submitted, the occupant(s) listed on this Tenant Household Information Form is/are eligible under the provisions of Section 42 of the Internal Revenue Code, as amended, and the Land Use Restriction Agreement or Regulatory Agreement (if applicable), to live in a unit in this Project.

\_\_\_\_\_  
SIGNATURE OF TENANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF TENANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF TENANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF TENANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF OWNER/REPRESENTATIVE

\_\_\_\_\_  
DATE

## INSTRUCTIONS FOR COMPLETING TENANT HOUSEHOLD INFORMATION FORM

*This simplified form is to be completed by the owner or an authorized representative after initial move-in and 1<sup>st</sup> recertification.*

### Project Data

|               |   |
|---------------|---|
| Property Name | Enter the name of the development.  |
| County        | Enter the county (or equivalent) in which the building is located.                            |
| BIN #         | Enter the Building Identification Number (BIN) assigned to the building (from IRS Form 8609). |
| Address       | Enter the address of the building.  |
| Unit Number   | Enter the unit number.  |
| # Bedrooms    | Enter the number of bedrooms in the unit.   |

### Household Composition

List all occupants of the unit. State each household member's relationship to the head of household by using one of the following coded definitions:

|   |   |                   |   |   |                            |
|---|---|-------------------|---|---|----------------------------|
| H | - | Head of Household | S | - | Spouse                     |
| A | - | Adult co-tenant   | O | - | Other family member        |
| C | - | Child             | F | - | Foster child(ren)/adult(s) |
| L | - | Live-in caretaker | N | - | None of the above          |

Enter the date of birth, student status, and social security number or alien registration number for each occupant.

*If there are more than 7 occupants, use an additional sheet of paper to list the remaining household members and attach it to the certification.*

### Rent

|                                  |   |
|----------------------------------|---|
| Tenant Paid Rent                 | Enter the amount the tenant pays toward rent (not including rent assistance payments such as Section 8).  |
| Rent Assistance                  | Enter the amount of rent assistance, if any.  |
| Utility Allowance                | Enter the utility allowance. If the owner pays all utilities, enter zero.   |
| Other non-optional charges       | Enter the amount of <u>non-optional</u> charges, such as mandatory garage rent, storage lockers, charges for services provided by the development, etc. |
| Gross Rent for Unit              | Enter the total of Tenant Paid Rent plus Utility Allowance and other non-optional charges.  |
| Maximum Rent Limit for this unit | Enter the maximum allowable gross rent for the unit.  |
| Unit Meets Rent Restriction at   | Check the appropriate rent restriction that the unit meets according to what is required by the set-aside(s) for the project.                           |

### **Student Status**

If all household members are full time\* students, check “yes”. If at least one household member is not a full time student, check “no”.

If “yes” is checked, the appropriate exemption must be listed in the box to the right. If none of the exemptions apply, the household is ineligible to rent the unit.

*\*Full time is determined by the school the student attends.*

### **HOUSEHOLD CERTIFICATION AND SIGNATURES**

Annually, each household member age 18 or older must sign and date the Tenant Household Income Certification to verify its accuracy.

#### **SIGNATURE OF OWNER/REPRESENTATIVE**

It is the responsibility of the owner or the owner’s representative to complete, sign and date this document.

The responsibility of documenting and determining eligibility and ensuring such documentation is kept in the tenant file is extremely important and should be conducted by someone well trained in tax credit compliance.

*These instructions should not be considered a complete guide on tax credit compliance. The responsibility for compliance with federal program regulations lies with the owner of the building(s) for which the credit is allowable.*